Plan Genius User Guide

Plan Genius Overview	2
Key Features	3-9

Plan Genius: Overview

Plan Genius is a dynamic tool, available on activation iPads, to help simplify ways to buy and plan selection for connected iPhone customers. It is also the best way to explain the benefits of the iPhone Upgrade Program and Installments with Trade Up.

Use Plan Genius to help customers:

- Understand ways to buy and rate plan options
- Compare offerings across carriers
- Determine total monthly cost of device plus service plan

Plan Genius displays the iPhone Upgrade Program, iPhone Installments with Trade Up, and available options of all four carriers together in one place. It is most appropriate for customers that you would take to a front-of-house Mac to explore carrier websites or the Apple Online Store comparison chart. The information displayed will show general offer and plan details available for either new or existing customers.

Use probing to determine if exploring Plan Genius would be helpful for the customer. Team members zoned in iPhone should have an activation iPad accessible. Activation iPads can also be requested through Runner as needed, or stored in the open watch drawer.

Explore this User Guide to familiarize yourself with the key features of Plan Genius.

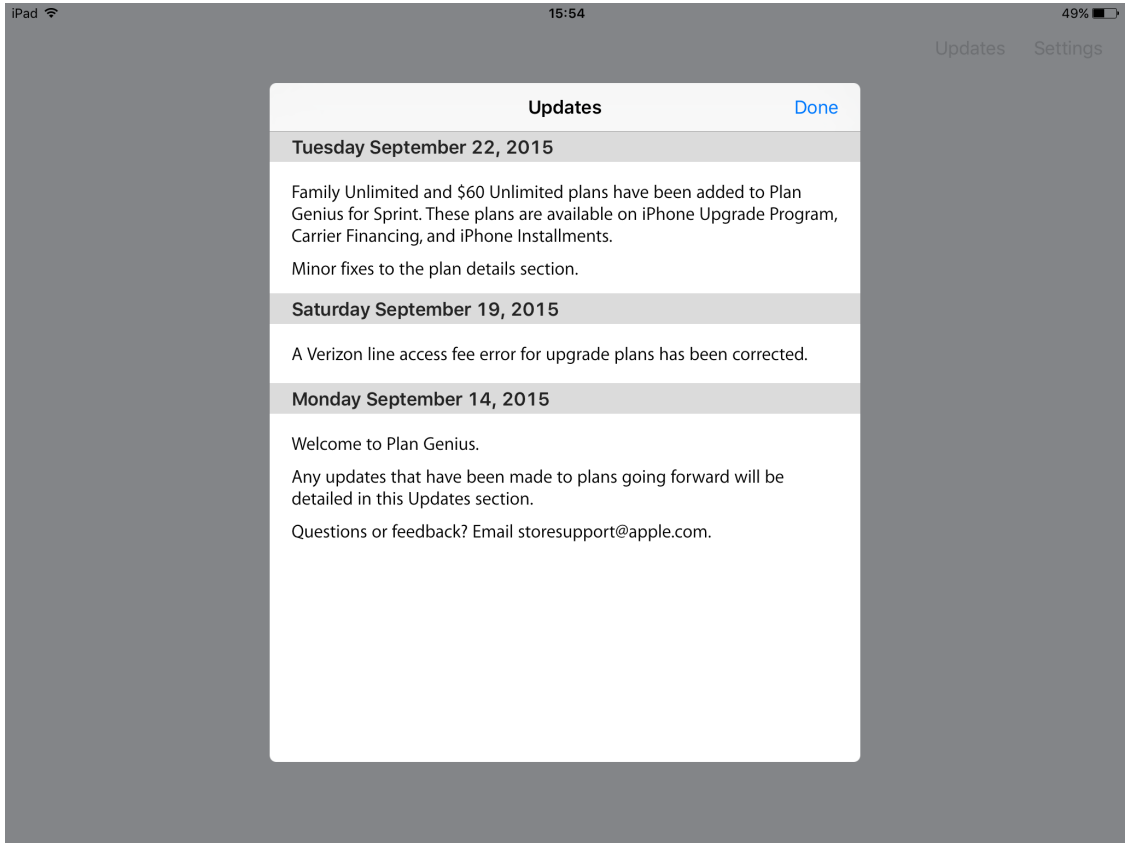
Key Feature: Updates Section

View Updates

Plan Genius is updated automatically, so the information is always current.

On the Welcome screen, tap Updates in the top right corner to see the last five changes to the app.

Tap Done to exit Updates.


iPad
15:54
49%
Updates
Settings
Updates
Done
Tuesday September 22, 2015
Family Unlimited and $60 Unlimited plans have been added to Plan Genius for Sprint. These plans are available on iPhone Upgrade Program, Carrier Financing, and iPhone Installments.
Minor fixes to the plan details section.
Saturday September 19, 2015
A Verizon line access fee error for upgrade plans has been corrected.
Monday September 14, 2015
Welcome to Plan Genius.
Any updates that have been made to plans going forward will be detailed in this Updates section.
Questions or feedback? Email storesupport@apple.com.

Key Feature: New/Existing Customer Flow

Select New

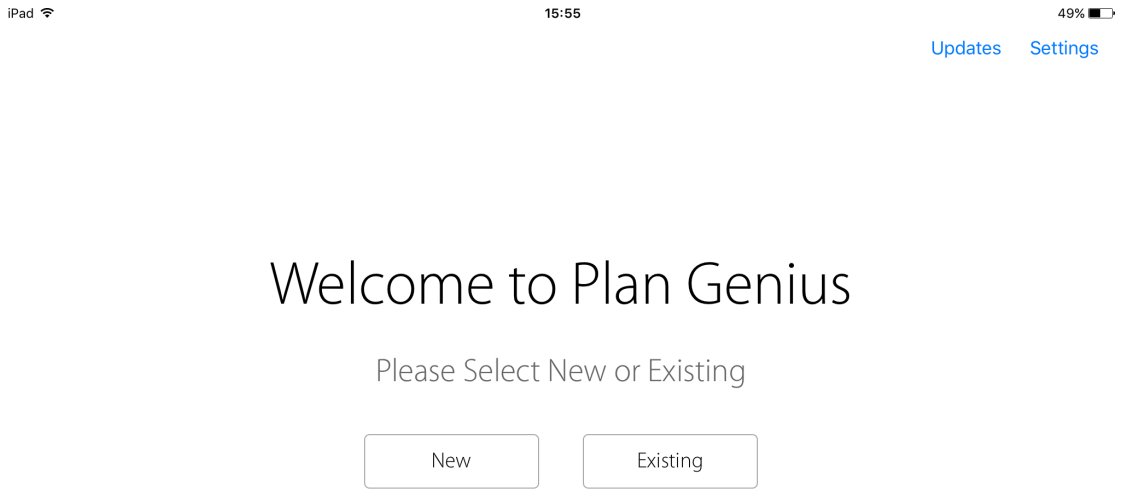
For customers without an existing carrier service plan, or those looking to switch carriers, select New on the Welcome Screen.

Plans for new customers across all four carriers will be displayed in the grid view.

Select Existing

For upgrade customers, select Existing. Buttons for all four carriers will then appear on the Welcome screen. Tap the customer's existing carrier to display their available plans for upgrade customers.

To add another carrier's new customer plans to the list, tap the filter button at the top left of the grid view and select the additional carrier(s) you want to display.



Key Feature: Grid View

Grid View

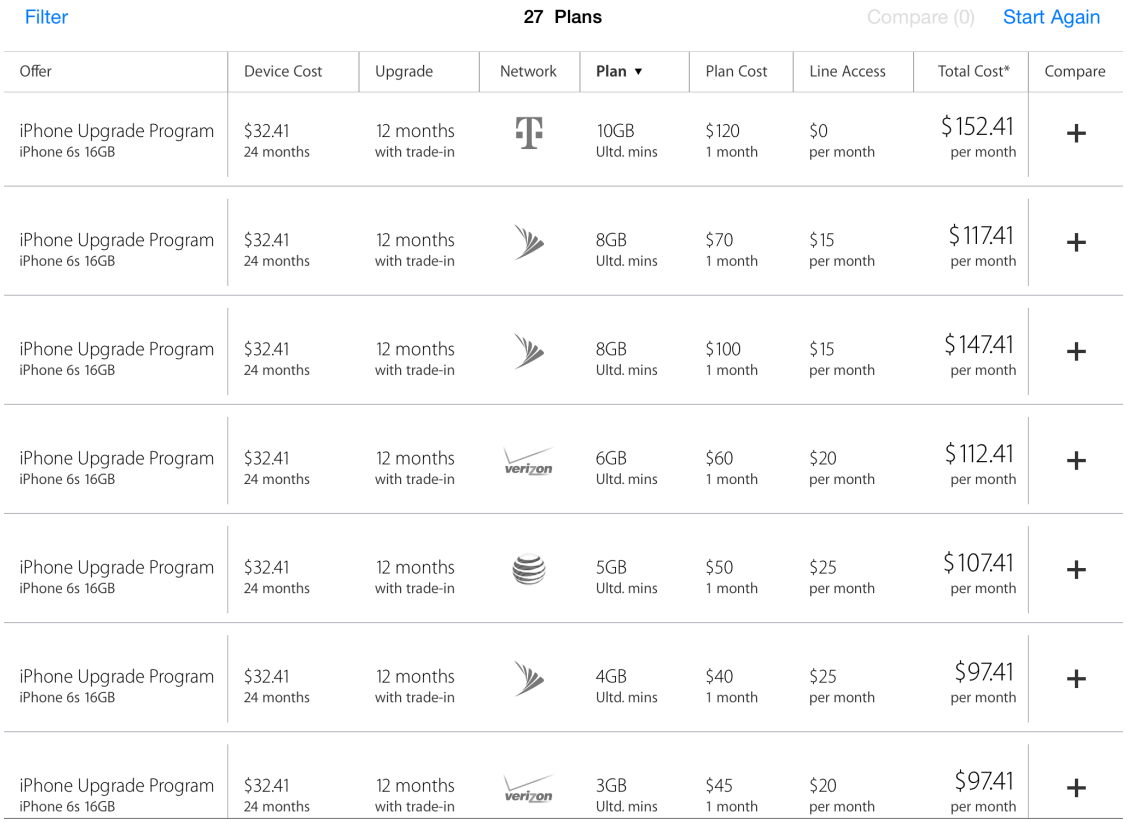
Plans will automatically be listed by Offer type, starting with Apple Offers at the top.

To Change Sorting

To sort based on criteria other than Offer type, tap any header other than Compare. The header you tap will become the new sort criteria and the list of plans will reorder automatically.

To Add Plans to Compare View

To add plans to the Compare view, select the '+' sign in the Compare column. Select as many plans as the customer would like to compare, there is no limit.



Key Feature: Filter Options

To Access the Filter View

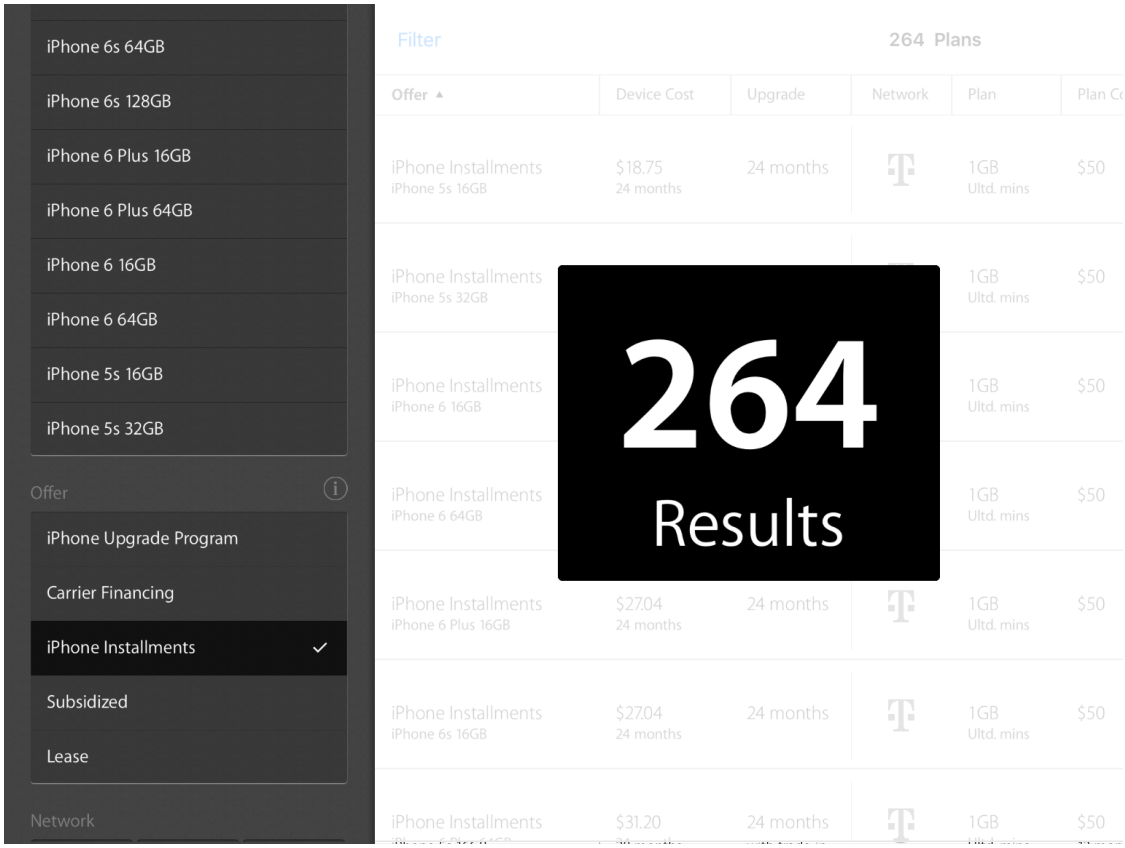
Tap the Filter button at the top left of the grid view screen. Tap the Filter button or anywhere outside the filter pane to return to the Grid view.

To Narrow Down Plans

Make selections from the filter pane at the left side of the screen based on the customer's preferences. This will narrow down the list of plans shown. Select and unselect filter options as needed.

Filter Options

Use filter selections such as device, offer, network (carrier), data, and total monthly cost to help the customer focus on the options that meet their needs.



Key Feature: Compare Multiple Plans

Select Compare
Plans that have been selected for Compare will appear side-by-side in this screen.

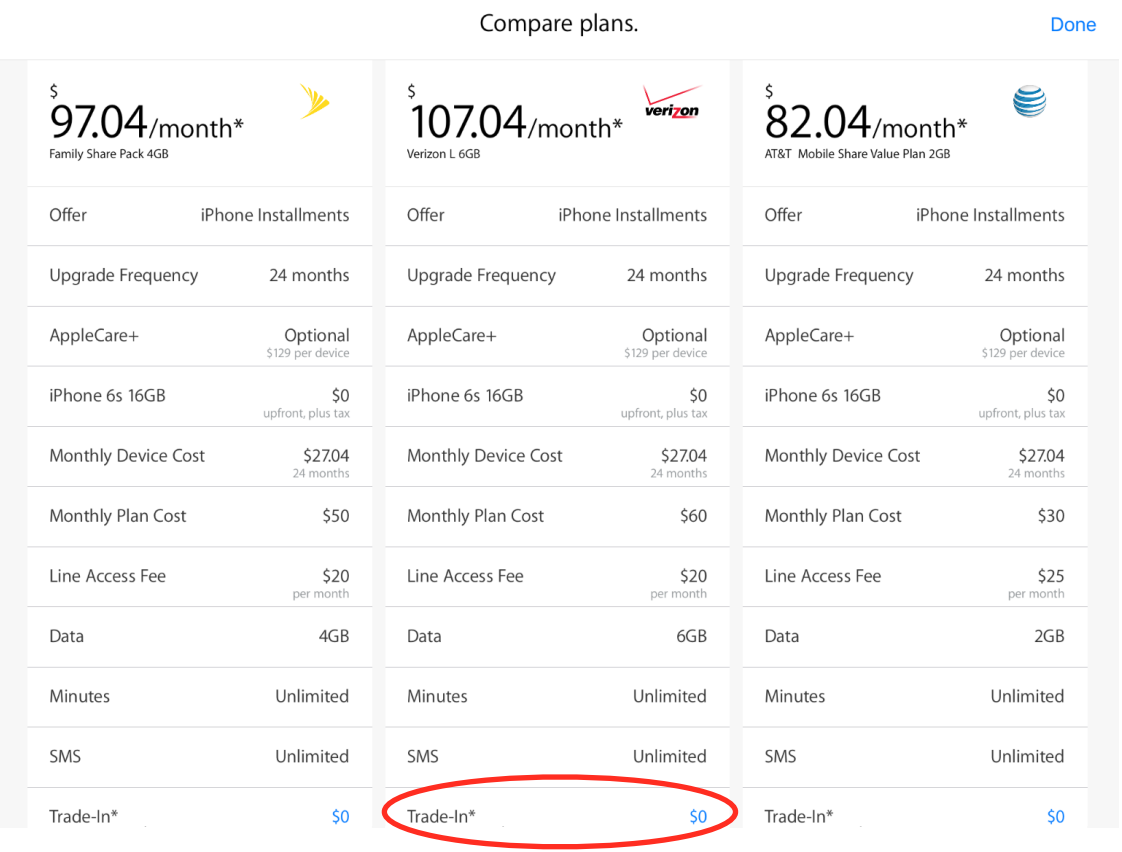
Scroll Plans
Choose as many plans as needed for side-by-side comparison. Scroll right to left to see all selected plans.

Trade In
Tap Trade-In, circled in red on the right, if your customer wishes to trade in their existing device.

Remove Plans
Swipe up on the column header to remove plans from the Compare view.

Reorder Plans
Tap, hold, and drag plan headers to reorder plans in the Compare view.

Add Additional Lines
Tap 'Additional Lines' to add additional lines to the total monthly cost.



Key Feature: Single Plan View

To View a Single Plan

From the grid view, tap anywhere in the plan's row except the '+' sign to see the full-screen view of that rate plan. Tap 'Add to Compare' to include that plan in the Compare view, tap Close to return to the grid view.

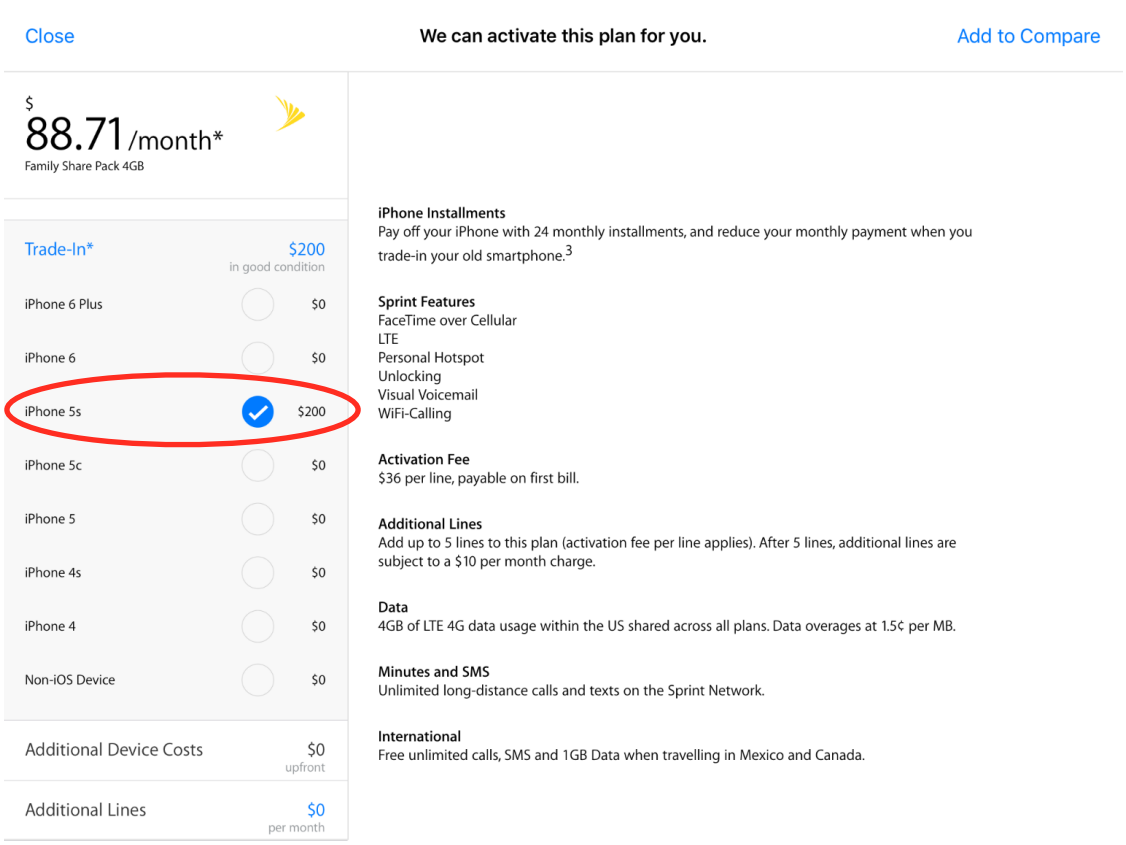
From the Compare view, tap the plan's header to view the full screen of the plan's details. Tap Close to return to the Compare view.

Trade In

Select the device model that customer is trading in. If customer is purchasing on Installments with Trade Up, trade in credit will be applied to the Installments with Trade Up initial loan balance.

Plan Features

Details of the plan's key features will be shown on the right side of the screen.

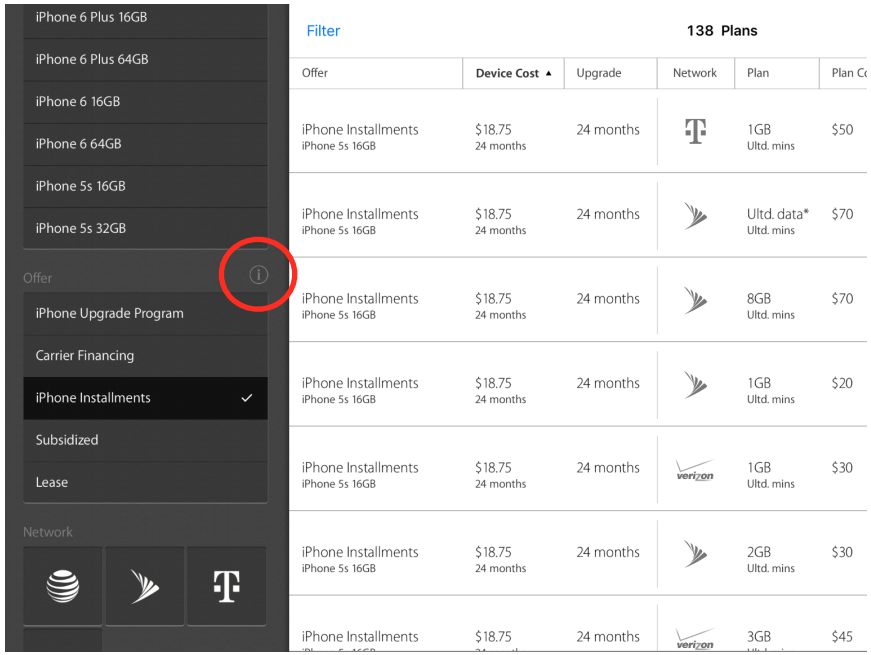


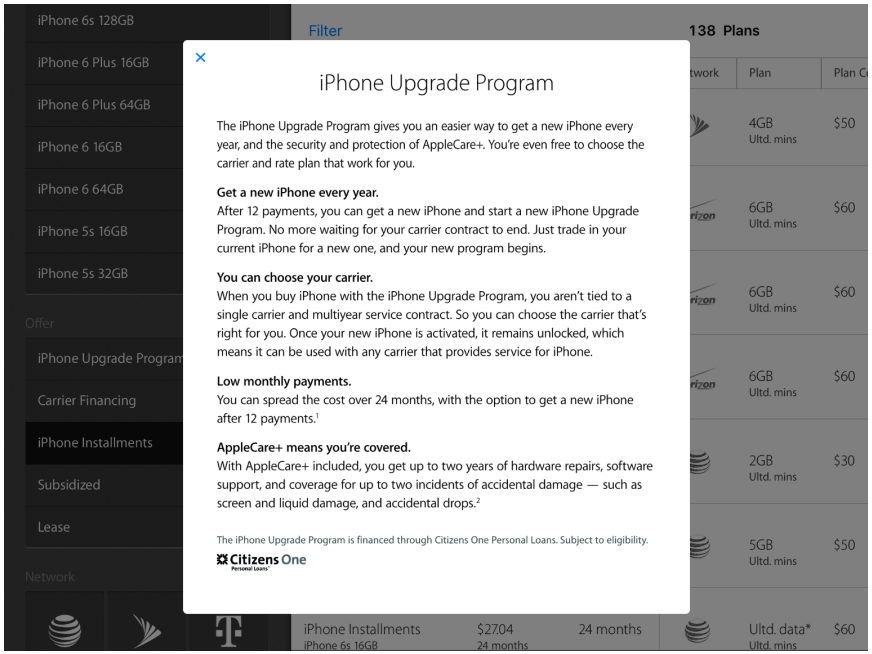
Informational Overlay

To View the Informational Overlay

From the filter view, tap the circled “i” to view offer information.

Tap on the close button in the overlay, or anywhere outside the overlay to close it.




iPhone 6s 128GB
iPhone 6 Plus 16GB
iPhone 6 Plus 64GB
iPhone 6 16GB
iPhone 6 64GB
iPhone 5s 16GB
iPhone 5s 32GB
Offer
iPhone Upgrade Program
Carrier Financing
iPhone Installments
Subsidized
Lease
Network
Filter
138 Plans
iPhone Upgrade Program
The iPhone Upgrade Program gives you an easier way to get a new iPhone every year, and the security and protection of AppleCare+. You’re even free to choose the carrier and rate plan that work for you.
Get a new iPhone every year.
After 12 payments, you can get a new iPhone and start a new iPhone Upgrade Program. No more waiting for your carrier contract to end. Just trade in your current iPhone for a new one, and your new program begins.
You can choose your carrier.
When you buy iPhone with the iPhone Upgrade Program, you aren’t tied to a single carrier and multiyear service contract. So you can choose the carrier that’s right for you. Once your new iPhone is activated, it remains unlocked, which means it can be used with any carrier that provides service for iPhone.
Low monthly payments.
You can spread the cost over 24 months, with the option to get a new iPhone after 12 payments.[1]
AppleCare+ means you’re covered.
With AppleCare+ included, you get up to two years of hardware repairs, software support, and coverage for up to two incidents of accidental damage — such as screen and liquid damage, and accidental drops.[2]
The iPhone Upgrade Program is financed through Citizens One Personal Loans. Subject to eligibility.
Citizens One
Plan
4GB
Ultd. mins
$50
6GB
$60
2GB
$30
5GB
iPhone Installments
iPhone 6s 16GB
$27.04
24 months
Ultd. data*